

CLIENT REPRESENTATIVE REQUIREMENT CHECKLIST

DDD clients are entitled to a representative who is willing to receive copies of Planned Action Notices (PAN) and assist them with understanding and exercising their appeal rights.

DO NOT initiate an eligibility review, assessment/reassessment of services, reduce or terminate an existing service, deny or terminate a provider until an NSA representative is identified, or the AAG agrees that the person is competent and no NSA representative is required.

1. For all currently eligible DDD clients: Complete the following steps prior to initiating any of the above actions.

- Review “significant others” in the Common Client Data Base (CCDB) and NSA information in CARE to identify the current NSA representative.
 - a) If none is listed, ask the client for his/her choice of NSA with the exception of contracted provider (other than legal representative, parent, relative).
 - b) If no representative can be identified, refer to the procedures in number 2 below.
- Confirm the representative’s mailing address and telephone number.
- Review with the representative their responsibilities per form DSHS 16-195 to accept the DDD notices sent to the client and assist the client to understand the decision and their appeal rights.
- Document this contact in the CARE SER.
- If there is a CARE assessment, mark “Yes” for the NSA question and enter the name of the NSA representative in the “Comments” box.
- Enter the NSA’s name, address, and telephone number as a collateral contact in CARE demographics and select Personal NSA from the contact role bucket.
- Ensure the CCDB and CARE records have this current information. Submit CCDB profile as necessary.

2. When a client has no NSA representative for one or more of the following reasons:

- a) There is no one available or legally allowed to act as the NSA representative; or
- b) The client objects to the person that is identified; or
- c) The client objects to the appointment of anyone to act as his/her NSA.
- Consult with your supervisor who will consult with the AAG.
- Enter the reason for delay in assessment or POC work and the SER.
- Continue current services until the NSA issue is resolved.
- If emergency services are authorized, DO NOT reduce or terminate those services until an NSA is identified.

3. Prior to sending ANY Planned Action Notice:

- Call the identified representative and explain the decision, the Planned Action Notice, and the client’s appeal rights.
- Document this contact in the SER.